

## *Benefit Statement Enclosed*

Your annual benefit statement is enclosed with this edition of the **Informer**. Review it carefully, since your statement contains information on group health, life insurance and beneficiaries. Refer to your statement during the annual Benefit Choice insurance enrollment period in May.

The statement also contains an annuitant identification card. Cut out the I.D. card and carry it with you as proof of your association with the state of Illinois for government and retiree discounts.

*maybe expound on how you can  
get discounts on airfare, hotels, etc  
using a govt ID card.*

## *Important SERS Telephone Numbers*

*Income Tax Withholding,  
1099-R, Address Change  
217-785-7034*

*Insurance  
217-785-7150*

*Retirement  
217-785-7322*

*Death/Survivor Benefits  
217-785-7366*

*Chicago Office  
312-814-5853*

## *Federal Income Tax Withholding*

Monthly benefits paid by SERS are subject to federal income tax withholding. If you have a request on file for federal income tax to be withheld, it will continue to be honored unless you request a change. To modify or end your withholding, you must notify SERS in writing.

If there is not a withholding election on file, taxes will be withheld as if you are married claiming three exemptions. This married person with three exemptions would have no withholding taken on a benefit of less than \$1,280 per month, unless it is requested.

You may have to pay taxes and penalties at the end of the year if your estimated tax payment(s) are not adequate. We will notify you through this **Informer** newsletter of any changes in federal tax laws that affect withholding.

## *The Ease of Direct Deposit*

Instead of waiting to receive your retirement benefit by mail, why not choose the convenience of Direct Deposit.

With Direct Deposit, your benefit is automatically deposited into the bank account of your choice. The Direct Deposit program has several advantages:

- Your benefit is deposited earlier, since Direct Deposit takes advantage of electronic banking.
- You don't receive a payment stub for each direct deposit payment. Instead, the Comptroller's office will periodically issue an earnings statement with information about your annuity payment. This comprehensive statement is also sent to you at the end of each calendar year.
- If you choose direct deposit, your first two payments are mailed to your home. All future payments are deposited into your bank account on the 19th of each month.

SERS encourages all retirees to take advantage of the Direct Deposit program. If you would like to enroll, or have any questions concerning Direct Deposit, call 217-524-8806.

# SERS Retiree Workshop

Since the 1990s, hundreds of studies have been performed in research and technology on the aging process. This body of research has discovered the many factors that allow us to live well into our 90s with healthy minds and bodies.

The SERS ***Myths & Realities of Retirement (MRR)*** workshop will explain the things you can do now to improve your health and make the most of your leisure time.

The MRR is offered to SERS retirees, survivors, disability benefit

recipients and their guests. This free one-day workshop lasts from 9 a.m. until 3:30 p.m.

Topics include financial and estate planning, health, Social Security and group insurance benefits.

If you would like to attend a MRR workshop, complete the enrollment application below and return it to SERS. Information about the exact workshop location will be mailed to you.

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*Circle the 2002 MRR workshop that you want to attend.*

Apr. 16	Joliet	Aug. 27	Rockford
May 14	Bourbonnais	Sep. 17	Rolling Meadows
May 28	Taylorville	Sep. 24	Effingham
Jun. 4	Utica	Oct. 1	Fairview Heights
Jun. 11	Urbana	Oct. 8	Rend Lake
Jun. 25	Rend Lake	Oct. 29	Springfield
Jul. 2	Chicago	Nov. 19	Peoria
Jul. 23	Peoria	Nov. 26	Chicago
Jul. 30	Carbondale	Dec. 3	Springfield
Aug. 13	Galesburg	Dec. 10	Tinley Park

Name \_\_\_\_\_

Social Security Number \_\_\_\_\_

Are You Bringing a Guest? \_\_\_\_\_

***Return this form to:***

State Retirement Systems  
Field Services Division  
2101 S. Veterans Parkway  
P. O. Box 19255  
Springfield, IL 62794-9255

## New Pilot Workshop

The State Retirement Systems is scheduling four “pilot” Myths & Realities of Retirement (MRR) workshops throughout the state. This new MRR will have a revised format that will include a free lunch.

***Please Note:*** These four pilot workshops are ***NOT*** part of the normal 2002 schedule.

The four locations are:

***April 10, 2002*** at the Senior Citizens Center, 409 North Springer, Carbondale

***April 12, 2002*** at the Miller Senior Citizens Center, 551 South 14th, Pekin

***April 30, 2002*** at the VFW Hall, 2211 Old Jacksonville Road, Springfield

***May 22, 2002*** at the Naperville Senior Citizens Center, 305 West Jackson Avenue, Naperville

If you would like to register for one of these pilot workshops, call Lee Brown at 217-785-6976. Leave your name, address and which location you want to attend.

You can bring a guest, but we can only take the first 60 registrations for each of the four locations.

***To repeat, this is NOT part of the normal 2002 schedule listed on the left!***



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40M - 3/02 • Printed on Recycled Paper